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ABSTRACT

This discussion of the audience for European television argues that satellite television has taken an upside-down approach, i.e., it has begun by focusing on the hardware, and then the software, before checking to see if there would be a user at the end of the line willing to pay for the whole operation. "European television" is then defined as being pluri-national in origin and multilingual in transmission, and some of the technical, organizational, and programming problems that must be solved are discussed. The characteristic features of the European audience are described, and the issues involved in finding an audience that is both receptive and productive are considered. Actions taken by the Council of Europe in an effort to strike a balance between the necessary development of media technologies and the defense of the audience's fundamental rights and freedoms are briefly described. The paper concludes by suggesting some ways of finding an audience while respecting its basic human rights. (CGD)

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WHAT AUDIENCE FOR EUROPEAN TELEVISION?

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INTRODUCTION: AN UPSIDE-DOWN APPROACH

As most owners of hi-fi systems have experienced, the quality of a chain of communication does not depend on the quality of its best element, but on how well its weakest link can perform. Obviously, launching and running television broadcasts on a European scale is a tremendously complex enterprise. Thousands of communication engineers are at work across Europe to avoid that their special hardware should be the weaker link in the system: satellites, launchers, up-links, down-links, and cables all must contribute to carry the television signal to a whole continent.

The glamourous technologies of skyrocketing communications have naturally enough caught the attention of public and politicians alike these last years. Conscience is however growing that, contrary to what McLuhan thought, once the "carrier" is there, the next issue becomes: what will it carry?

The Commission of the European Communities has estimated that given already available, ordered and planned satellite transponder capacity, the television programme need for Europe by 1990 will be in the order of 1,250,000 hours per year, including 500,000 hours of fiction.

The question increasingly asked in government and international organisations is: who will make these programmes? The question is all the more legitimate as current programme output in Europe would almost have to increase tenfold in order to fill the new channels in more or less the same way it fills the traditional ones.

Notwithstanding the answer which will be given to this problem, it can be assumed that numerous television channels relayed via satellites (and cable) will be available (already are in some areas) all over Europe.

If we consider the enormous number of programmes that they will carry, the number of hours in a day which will remain limited to 24 and the stagnating number of Europeans, the next question is: who will watch the programmes?

The following paper will try to establish whether there will be an audience for European television. The audience is the last element in the satellite television communication system. It may well turn out to be the weaker link in the system.

There are two reasons why one could a priori think that this might be the case. Firstly, because very probably, as French psychosociologist Moles says "television is at the peak of its power, and on the eve of its downfall". Secondly, the approach taken in satellite television has been an upside-down one. Instead of starting with the receiving end of the message, all efforts have been put into the hardware, then the software, before checking if there would be a user at the end of the line, willing, in the final analysis, to pay for the whole operation.

The considerations which follow will start with an attempt to define what one means exactly by "European television", before pointing to some of the problems which have to be solved, and then drawing the characteristic features of the European audience. The problems of finding both a productive and receptive audience are covered as well as the need, through co-ordinated action in the Council of Europe and other organisations to define a media policy taking into account the fundamental rights of the individuals making up the audience.

I. DEFINITION(S) OF EUROPEAN TELEVISION

Perhaps the best way to start looking at European television is to take the view from outside Europe. To American or Japanese professionals European television is synonymous with high quality, diversified and

sometimes slow-moving and boring broadcasting. It is a concept applying to national systems, not to transborder transmissions.

Of course there has always been "natural spillover" of channels operating in border areas, or even intentional spillover, for instance of RAI wanting to reach Italian communities outside Italy, or NRK relaying its programmes via satellite to the North Sea oil platforms. It is to be supposed that progressively all national programmes will be relayed in this fashion, if only in order to free costly terrestrial networks. They will all become "European" in the sense that most foreign cable operators (or individuals with the right equipment) will be able to pick them up and offer them to their subscribers.

However, the main difference with a purely national broadcast occurs when there is an intention to reach a foreign audience. Such is the case with the pioneer in this field, namely Sky Channel, but also with American CNN and Worldnet (one private, one government run) and ITV's Superchannel to come.

A further degree of "Europeanness" is achieved when the origin of the channel is pluri-national, ie formed by a grouping of national broadcasters using a same language, such as French speaking TV 5 or German speaking 3 SAT, or a consortium of companies from different countries, as with the Maxwell-Seydoux-Berlusconi consortium planning to operate via French satellite TDF 1.

A completely European character is however only achieved when a programme is not only pluri-national in origin but also multi-lingual in transmission. This is where a proper tribute should be paid to the European Broadcasting Union (EBU) whose "multilateral" transmissions (major events, including sports; daily news; Eurovision song contest and "It's a knock-out"!; music and opera) were the first and still are the only genuine European broadcasts, with a common picture source accompanied by national commentary, simultaneously reaching the whole of the continent.

The very limited nature (in terms of items and hours of transmission) of EBU multilaterals brought about the idea of creating a permanent European channel in the early 80's. The pioneering EURIKON experiment was followed by EUROPA TV now broadcasting out of Hilversum by a consortium of five public broadcasters: NOS, ARD, RAI, RTE and RTP. Programmes are planned to move progressively from a two-language set-up to subtitling or dubbing into several languages.

Another pluri-national, multi-lingual channel to be broadcast over Europe is the Pierre Desgraupes-initiated cultural "Canal sept", for which funding by the French government is provided, but not the decision as to what sort of "cultural" programmes should be transmitted.

The difference between the EBU programmes and the last two projects are twofold: (a) the terrestrial networks used until now by the EBU are expensive and often block other national transmissions, and the events related are mostly foreseeable and commentaries in the different languages can therefore be prepared at the receiving end; (b) satellite link-ups cover the whole of Europe at a fraction of the traditional cost, but the central character of transmission also makes centrally organised subtitling or dubbing necessary. It seems that this last point represents a particular difficulty for European television.

If all these developments have to be taken into account, European television today has to be defined as "television services intended for a pluri-national European audience transmitted via geostationary satellites either directly to the viewer (DBS*) or indirectly through a cable distribution network (SCATV** or SMATV***)".

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* Direct broadcast by satellite
** Satellite to Cable TV
*** Satellite to Master Antennae TV

II. PREREQUISITES FOR THE EXISTENCE OF EUROPEAN TELEVISION SERVICES

This is just a brief recapitulation of some of the issues that have to be dealt with before any programme goes on the air via satellite. They are recalled because if they are not solved it will have one immediate effect upon the audience: there will be no programme to watch.

For the time being the main discussions, technical, political and financial concern the technical sides of European television: what transmission standard(s) to adopt, who will produce decoders, antennae, tracking devices, satellite hardware, etc. The solutions seem to be forthcoming, but gigantic industrial and commercial battles loom, perhaps for the benefit of extra-European interests.

Another problem directly linked to the national (if not nationalistic) make-up of Europe is where to locate the organisation of operations, how to compose an editorial and scheduling team, with whom to make responsibility rest.

How to pay for European broadcasting has always been the major concern of Europa TV and indeed solutions have to be found to the financial problems involved: can some part of national licence revenues be diverted into European operations, should advertising be used, what subsidies can be obtained, can receiving cable operators organise subscription or pay-per-view contracts, etc.

Concerning programmes, the actual content of the new satellite services, not only is there a problem of scheduling, of content and of programme guidelines to be solved, but programmes actually have to be found, at an acceptable price and showable to a pan-European public. This means finding programme creators who have a sense of what would be acceptable, or preferably desirable, to a multi-cultural audience, and willing to concede broadcasting rights for the whole of the continent. One should not forget that some highly successful programme exporters (such as the

BBC for instance) find it much more profitable to sell their products to each individual national broadcaster rather than to trade with a present or potential pan-European one.

The difficulty lies also in clearing copyrights for a programme: with whom should one deal, whom should one pay, how does one prevent the pirating of programmes bounced off a satellite, how does one control exclusivity agreements, etc.

These problems are just mentioned "en passant". Our main concern appears once all these practical problems have been solved: is the audience at last reached, or rather, who will be sitting in front of that television screen once European television has come into existence?

III. CHARACTERISTICS OF THE EUROPEAN AUDIENCE

The correct approach would be, it seems, first to assess the facts about the European audience, then to see whether potentially it would be a receptive one, and if so, if it would be a productive one.

1. THE FACTS

The audience size is a first good indication of the importance of our problem: there are some 400 million Western Europeans, living in 22 countries, speaking 17 main languages and belonging to 12 cultural zones.

This means that Europeans resort to 12 different ways of expressing their feelings, presenting their views and formulating their opinions. Their perception grids are of 12 different kinds, as are their exposure behaviours and retention patterns. These cultural distances separating (or linking) them vary sometimes by as much as 1 to 8 making some cultures seem closer to extra-European ones than to others on the same continent.

The television equipment which this audience commands is another of its characteristics: there are approximately 115 million television sets in Western Europe, ie on average one in every home, although this proportion varies a great deal between the north and centre of Europe and the South. The 46 television channels operated by members of the EBU broadcast approximately 160,000 hours of programmes per year (1985), which makes some 430 hours every day of the year or 9.4 hours of programmes per day per channel on average.

What possibility the audience has to receive satellite-relayed programmes is best indicated by the DBS or FSS* reception facilities available in Europe. Statistics in this respect, as in a number of other ones, are difficult to interpret. Available figures cover in fact widely different situations in particular with regard to cable.

Let it first be said that no proper DBS transmission or reception exists in Europe, nor anywhere else for that matter. This is if one understands DBS as meaning broadcasts transmitted via high-powered satellites direct to small individual home dish receivers. A growing number of individuals are however installing medium-sized antennae (1.4 - 2 m) in their backyards to pick up television programmes meant for cable network heads and transmitted by low-powered telecommunications satellites. If the American experience is anything to go by, that market could develop rapidly (some 45,000 such dishes are reported to be sold in the US every month).

Satellite broadcasters and programme distributors had not been counting on this sort of parallel "pirating" of programmes by individuals. They were basing themselves on the progressive cabling of Europe while

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* FSS = Fixed satellite Services, ie satellite programmes distributed by cable

hoping that DBS satellites TV-SAT (Fed. Rep. of Germany), TDF 1 (France), Olympus (EBU) and TELE-X (Nordic countries) would be operational in the years 1986-87.

In the meantime, cable has turned out to reach relatively few people, mainly because the starting point was vastly overestimated. In fact most of what was, and still is in some reports, considered as "cable systems" are only community antennae with fewer than 300 outlets and a capacity of no more than 3 or 4 channels (10 million households). The number of master antennae systems for TV reception with more than 300 outlets, also with limited channel capacity, was also included in most estimates (another 10 million households).

This leaves an estimated 10 million households effectively connected to an appropriate cable system, capable of receiving and distributing satellite programmes, ie some 8% of all Western European television homes. Realists add that most of the channels of these cable systems are already taken up by existing programmes and that competition for the free ones will probably be fierce. The free capacity would in any case affect only 4% of European households, a figure one has to compare with the some 39 million cable subscribers in the US (46% of TV homes).

Whereas further cabling in North America seems to proceed at a rapid pace, the development in Europe has not met with expectations, notably in major countries such as France, the Federal Republic of Germany and the United Kingdom. The important investments needed for broad-band coaxial cabling, or much more so, for multi-channel optical fibre systems seem to have deterred private investors as well as government agencies. This explains the massive delay incurred in the implementation of ambitious "plans câble" set up in various countries.

Paradoxically therefore, satellite television's best bet could turn out to be DBS after all (serious doubts had been expressed concerning this technology from the early 80's on), either through the coming high-powered satellites or the planned medium-powered, multi-transponder satellites, suitable both for DBS and for master antennae reception and distribution (SMATV).

If we assume that the viewers in the years to come will in fact have the means to receive European television services by satellite, we may also ask if they will be willing to watch them.

2. FINDING A RECEPTIVE AUDIENCE

Recent surveys (European Commission, Europa-TV, etc) show that television viewers throughout Europe on the whole express a positive interest in European programming. A few figures are however needed to put this attitude into perspective.

First there is the "time-budget" of the individuals who make up the audience. On continental Europe the average viewer already spends more than two hours per day watching television. This figure rises to around three hours for Great Britain and Japan, with a peak of approximately four hours in the United States. In the latter two countries, the arrival already years ago of a multi-media situation similar to the one we can expect shortly in Europe, did not significantly increase viewing hours per individual. Some figures suggest on the contrary a slight drop. Although there may still be some viewer-time available for European programmes, the situation will generally be one of competition between media within a fairly rigid audience "time-budget".

But not only is available time limited, the financial resources of the viewer are as well. One only has to consider the amount it has been estimated it would cost him to respond to all new, and old, media sollicitations. A figure of 15,000 US$ has been quoted for the acquisition price of a modern private "media centre", with montly running expenses reaching 150 US$. It is into this sort of financial context any new media, including European television services will have to fit.

Another dimension of the European audience which has to be considered is the linguistic one. Culture and language diversity is often considered to constitute the richness of Europe. It also sets the limits for its unity, and therefore for the possibility of reaching it in any global way through European programmes, even when extensively dubbed or subtitled with the help of techniques yet to be finalised. The 17 different languages of Western Europe, should they all be used, would total the staggering number of 272 "language pairs". All these linguistic combinations would have to be catered for by an armada of interpreters, translators, actors, dubbers, typists, etc. at a prohibitive cost.

And that is only language: the distortion potential involved in such an enterprise would be equally impressive. If one extends the factor (6) of possible distortion of meaning inherent in any communication act to European mass communication on the level of all its 22 countries, it becomes multiplied by almost 100. When operating a system of mass communication on a Europe-wide scale one therefore must allow for nearly 100 times more chances of misinterpretation of meaning than in a simple monolingual communication, or more than 10 times more than in a monolingual mass communication situation.

The audience is there, but it seems to be a very complicated and expensive one. Under what conditions could it become a productive one?

3. PRODUCING A PRODUCTIVE AUDIENCE

With the advance taken in matters of media in the United States it is interesting from a European point of view to examine what has happened there in the course of the last ten years or so.

Of particular relevance to our topic is the evolution of the relationship between the television media and the audience. With the massive arrival of cable and video between 1975 and now, how did the audience react? Rating figures show on the part of the viewers a great deal of loyalty towards the three major networks, their share of the prime time audience only dropping from 90% in 1975 to 74% in 1985.

These proportions have to be seen in relation to the previously established fact that viewing hours are not increasing, nor is the total TV-home population, at least not significantly. What also remains stable is the threshold from which an audience size is considered "productive". This profitability size is between 20 and 30 million viewers, ie more than 10 million homes should be effectively watching a programme for it to be considered a reasonable investment by the American networks.

The situation certainly is and will remain very different in Europe, but as one starts operating television services on a European scale comparable profitability thresholds will come into play, if only because of competition with programmes which have already satisfied the American criteria. In fact, achieving audience sizes of the magnitude registered in the United States is probably the only way for European productions to become truly competitive from a financial point of view.

This is all the more important as the investments which have to be recuperated will be considerable. According to recent estimates some £1.3 billion will be needed for launchers and satellites alone from now to 1989, and between £14 and £75 million per year for the programming of each

satellite channel. Other figures of interest are the starting up costs of satellite broadcasters which vary from £1-2 million for information and copyright free re-broadcasting channels, to £20 million for family entertainment type ones, and to an estimated £65 million for a European culture channel. Only the last category of project would attempt to solve the language problem mentioned above.

According to available information another £2-3 million are needed for the yearly transponder leasing on a telecommunications satellite, rising to £90-130 million if a DBS transponder is to be leased.

Whatever the methods of financing of these investments, one can be certain of one thing: they will finally be paid by the very last link in the chain, namely the audience. Whether this is achieved through subscriptions to programmes, licence fees, taxes or the purchase of advertised goods and services is irrelevant.

In this context it is interesting to look at satellite television operators' audience size estimates or expectations. They vary a great deal,to say the least: 3 million homes for TV 5, 5.6 for Europa TV (rising to 27 by 1990), 6-7 for Superchannel, 7 for Sky, 13 for Cultural Canal 7 and 35 for popular Canal 5. Although it is too early to obtain actual audience ratings, even for already operational satellite programmes, a potential public certainly is there, and governments throughout Europe have thought it right to look into the effects of the new media developments on the situation of the individual. Concern was first voiced about possible threats to his rights as a citizen, but now a more balanced approach is followed, in particular by the Council of Europe.

IV. COUNCIL OF EUROPE ACTIONS

With its 21 Western European member States, the Council of Europe not only corresponds to the footprints of the satellites, it is also the only organisation based on the protection of the fundamental freedoms and rights of the individual.

This is why its approach to the new media expresses a threefold concern:

- the new technologies should contribute to enhance the individual's freedom of expression and information
- their use should be guided by common European principles
- they should operate within the framework of harmonised European media laws.

On the basis of Article 10 of the European Convention on Human Rights, which guarantees the freedom to receive and impart information or ideas regardless of frontiers, the Council of Europe adopted in 1982 its Declaration on the freedom of expression and information. This solemn declaration confirms the Organisation's commitment to the independence of the media and the international free flow of information. In its wake two major issues of interest for the European television audience were raised: the use of satellites and the promotion of programmes of European origin.

A first Recommendation (N° R (84) 3) was adopted in 1984 on television advertising, especially by satellite. A number of common European rules concerning types, content, frequency and total amount of advertising are set out.

Recommendation N° R (84) 22 on satellite broadcasting, also from 1984, specifies in particular the principles of applicable law, standards of programme content, the responsibility of broadcasters, etc.

Two years later Recommendation R (86) 2 on copyright and satellite and cable television takes a first step to make it possible to apply copyright law to the new transfrontier transmission of programmes.

Recommendation R (86) 3 of the same year aims at promoting programmes of European origin through measures of encouragement to creativity, programme production and distribution throughout Europe. Further concrete measures will probably be adopted later this year, when the European Ministers responsible for mass media policy will meet in Vienna for a first such Council of Europe meeting (9-10 December).

The Ministers will also discuss the situation of public and private broadcasters in Europe.

On the whole the Council of Europe's action tries to strike a balance between the necessary development of media technologies and the defence of the audience's fundamental rights and freedoms.

The following conclusions will in no way attempt to give an answer to the question put in the title of this paper. It will however try to outline some ways of finding an audience for European television, while at the same time respecting the basic rights of that audience.

V. CONCLUSIONS

These final remarks all pertain to facts: facts to be avoided, facts to be respected, facts to be influenced.

1. Reducing the number of points of distortion in European mass communication

The great number of these means it is even more important than usual that as many intermediaries as possible in the communication chain should be cut out: people, companies, channels, technical relays, etc.

"Audience-friendly" programmes for Europe should need little or no interpretation/translation or then allow for plenty of time for adequate adaptations.

Common denominators in the past, in joint projects and European issues should be inserted into programmes.

Ambiguities, subtleties, specialities, colloquialisms, etc. should be cut out.

2. Respecting facts.

The audience share needed to make European television a profitable venture is so large that far from all the present projects will succeed. Extreme selectiveness would seem imperative.

Programmes will have to be saleable to a cross-European audience and must therefore respect its characteristics and specificities.

The size of the investments needed and the hypothetical returns indicate that strong, long-term financial backing is necessary.

3. Influencing facts.

The pioneers in satellite television looked ahead and took immense chances. Not only did they learn just how difficult it was (is), but viewers and government at the receiving end often learned as well and many changed their ways, and rules and regulations too.

They were perhaps helped in this by the pressure of American "culture" in Europe. American films, best-selling books, weeklies and dailies were in a way "European" long before any European media. The arrival of the satellites perhaps made politicians realise that this time the real test had come. Judging from the activity taking place in the Council of Europe as well as in the Common Market and in professional bodies such as the European Broadcasting Union, Europe is definitely bracing itself for the

arrival of European television. Hopefully the European audience will respond to it with as much interest, if not enthusiasm, as the officials, the broadcasters and the entrepreneurs.